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ABSTRACT

Noting that basic courses in advertising provide little or no instruction in how to perform the tasks of account management, this paper suggests the outlines of a syllabus which will prepare a future account manager at least as well as courses in copy, layout, and media planning prepare their future professionals. The course outlined in the paper is rooted in academic inquiry and fundamental college disciplines and applies to an understanding of all service businesses. The course described is built around the relevant study of corporate culture, process management, people management and product evaluation/sale. Contains 49 references. (RS)

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ED 369 109

ADVERTISING DIVISION:
Teaching Research Session

TEACHING ACCOUNT MANAGEMENT

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ABSTRACT

Basic courses in advertising provide little or no instruction in how to perform the extramural and intramural tasks of account management.

The question discussed in this paper is: If account management is a critical agency function, how can we educate students to best perform this function?

A general syllabus is proposed -- built around the relevant study of corporate culture, process management, people management and product evaluation/sale -- which is both academicly sound and skill specific.

Before and since the publication of *The Man in the Gray Flannel Suit* the Account Executive has lived in myth and legend. Young people aspire to the role and social critics scoff at what they perceive as the quintessential quisling self-marketer. It is remarkable, after all the dreams, ink and mockery, how little understanding there is of the role of account management in an advertising agency. More importantly, there are few materials available which explain and support the account management function.

The question faced by this paper is: If account management is a critical agency function, how can we educate students to best perform this function?

Situation Overview

The head of information services at the American Association of Advertising Agencies (4As) once pleaded: "Please give me something I can refer people to which answers their questions." Of the over 23,000 questions received at the 4As each year, the vast majority of them relate to the account management function. The 4As publishes booklets for Account Executives, but these booklets are only occasionally useful, especially since they tend to be an

overall introduction to advertising rather than an explanation of what account managers do and why they do it. Their character and existence, however, tends to support the position that a key quality of account managers is that they are advertising generalists.

Basic Courses

This view of account managers as advertising generalists also appears to characterize academic education. An informal survey of college and university catalogues and interviews with a sample of advertising educators suggests that the education of future account managers generally relies on their preparation as "advertising generalists" or on courses in advertising management. Neither specifically elaborates on the character and skills of account management.

Extrapolating from Billy I. Ross' study of Advertising Education, we can conclude that a typical core curriculum in advertising includes:

Principles/Introduction

Copy and Layout

Media Planning/Strategy

Campaigns

None of these courses provides more than passing acknowledgment of the account management function. They recognize that someone is responsible for an agency's product, but do not elaborate on how or why the function is performed.

The scene is set at the introductory level. For example, Bovée and Arens describe account managers as "the liaison between the agency and the client." Responsible on the one hand," they continue, "for mustering all the agency's services for the benefit of the client and on the other hand for representing the agency's point of view to the client, the account executive is often caught in the middle. AEs, therefore, are virtually in business for themselves." Account management never surfaces again in 698 pages.

In the Wells, Burnett and Moriarty introductory text, the account management function is given slightly more consideration. They write that "the role of account management is to serve as a liaison between the client and

the agency. The account management function," they continue, "ensures that the agency focuses its resources on the needs of the client and develops its own point of view, which is presented to the client. Once the client (or the client and agency together) establishes the general guidelines for the advertising, the account management department supervises the day-to-day development of the account within these guidelines." They add another page of description, but the rest of their 584 page text never further discusses the account management function.

The purpose here is not to criticize these excellent text books but rather to highlight that they initiate and support the belief that the best educational training for an account manager is to become an advertising generalist. In most introductory texts extensive chapters give detailed treatment to copy and layout, and to media planning and buying. This approach is reinforced in most curricula by the requirement of courses in Copy/Layout and Media Planning/Strategy.

Advanced Courses

Campaigns courses synthesize the separate disciplines

as part of the process of planning, executing and integrating advertising in the marketing effort. Thus, these are courses about "setting advertising objectives, developing advertising strategies, and then executing those strategies in the marketplace." When a practicum is involved, these courses may assign tasks to "account managers" but they provide little or no instruction in how to perform their intramural or (more importantly) their extramural tasks.

Advertising Management is the fourth "most frequently required course" (Ross) and often provides a sophisticated understanding of advertising from the marketer's, client's or business school perspective. They present advertising management as a decision making process and, lest we forget it, decisions are made by the clients who sign the checks. As Aaker and Myers express it in their superlative text, "Advertising management is heavily focused on the analysis, planning, control and decision-making activities of this core institution -- the advertiser."

The advanced analysis of advertising often provided by these courses -- and their introduction to client attitudes and how they think -- can be of enormous value to the future

agency account manager. Nevertheless, these courses do not instruct the future account manager in how to perform the account service function at an agency, nor do they provide entree to general educational experiences which might be provided through the prism of account management.

Supplementary Texts

There are books written from the client point of view by professionals with extensive advertising agency experience which come closer to introducing the responsibilities and experiences of account managers. They include "How To Get The Best Advertising From Your Agency" by Nancy Salz, "Choosing and Working With Your Advertising Agency" by William Weilbacher and "Getting The Best From Your Ad Agency" by Joe Marconi. These are useful supplementary texts, but they are not directly about account management and what can be learned from studying it.

An agency perspective is available through such books as Wes Perrin's "Advertising Realities", "The Advertising Agency Business" by Herbert S. Gardner, Jr. and the privately published "How to be a More Effective Account Manager" by Len Gross, John Stirling and Jeff Saperstein.

Books such as these are full of useful advice and some practical detail. They are not designed as learning tools, however, and couldn't sustain a course at the university level.

Situation: Analysis

After any survey of the field, you have to conclude that unlike the Directors of Creative, Media, Research and their departments, the Director of Account Management or Client Services and his army of account executives are non-persons with jobs defined more by personality than by substance. You have to wonder why? Several possible reasons are:

* Account management (unlike creative, media and research) does not produce a product.

* The absence of a product makes obscure what possible support traditional intellectual disciplines such as the social sciences or communication arts can contribute.

* This situation makes it difficult to describe

an academic discipline for account management and raises the question of whether it can be taught.

* Experienced account managers do not, generally, possess, or devote time to, the abstracting and thoughtful disciplines of academics, and academics have not had access to what has been a very existential, experience-based craft.

* Advertising agencies have traditionally trained their own account people, passing on their wisdom in a comradely environment as knowledge is passed in a primitive or secret society.

The stone in the peach, however, is that agencies do have formal training programs for account managers. Furthermore, any survey of client dissatisfaction with agency performance almost always highlights functions under the direct responsibility of account management. Therefore, it is a significant social or business function which ought to be subject to definition and discipline in an academic environment focused on advertising.

Defining the Subject

Account managers are the primary liaison between the client and agency. They are responsible for developing and articulating advertising strategies both for and with the client.

Within the agency, account managers supervise and participate in the production of agency materials and recommendations. They set priorities, ensure delivery on promised budgets and schedules, secure clearances and legal approvals, and approve all recommendations before they are presented to the client. They keep all business records, and are responsible for insuring a realistic profit by the agency.

Account managers supervise the presentation of major agency recommendations. They are also responsible for obtaining the client's approval of all advertising activities.

There are four elements which can be discerned within all these activities. Account managers,

1) Manage the client relationship.

2) Manage and share responsibility for the operation of accounts.

3) Possess and exercise extensive management skills.

4) Exercise quality control and gain client approval of the agency's products.

The position of this paper is that the concepts and skills involved in these functions can be taught and are not effectively taught in other core advertising courses. Furthermore, the teaching of the relevant concepts and skills is directly relevant to all service company management and, therefore, relevant to a wide variety of social and economic activities. Thus, a course in account management could be viewed as an important element of an advertising curriculum, as well as being broadly relevant and useful.

Course Elements

1. Defining Role and Issues

A survey by the Gallup Organization in 1989 indicated a steady decline in advertiser' confidence in their agencies. A later study by Waldman, Moore & Associates, a New York consulting firm, discovered that a majority of the advertisers surveyed were dissatisfied with the treatment they were getting. Nancy Saltz, who takes the pulse of agency client relationships on a regular basis, continually discovers major client dissatisfactions.

The question is: Why? Is it simply the tensions of a marriage where "one side is always questioning whether they are happy", as Jerry Della Femina believes? Or, is there a consistent set of issues which could be addressed and resolved?

There is little question that up to 85% of the strains and tensions in the advertiser/agency relationship are derived from activities which are the direct responsibilities of account management. There is an extensive literature on the subject. The problems do not

arise from the creativity (or lack of it) of the creatives, nor the efficiency of the media planners. The problems of client satisfaction are prototypically the result of shortfalls in account management.

The first task, then, is to delineate the character and origins of the problems involved. The result will not only describe the role, function and importance of account management to any service organization or industry, but also identify the key elements of an account management discipline.

2. Managing the Relationship

The key fact is that account managers are paid to be conscious (even, self-conscious) and conscientious managers. Their first task is managing the agency/client relationship. This means increasing client satisfaction and the perceived value of the agency. We are often told that this requires an understanding of the client's business. More fundamentally, however, client service and client satisfaction requires an understanding of the client's company, an understanding of the clients as persons, an understanding of their perception of the role of advertising in their business, and an

understanding of how they define good account management.

The first requirement, therefore, is an understanding of the importance of corporate culture and the ability to identify and respond to a client's corporate culture. There is a growing literature on corporate culture which is significant for account managers and important to any understanding of the world of business.

2.1 Corporate Culture

Corporate culture is a system of shared values (what is important) and a system of beliefs (how things work) which interact with a company's people, organizational structure and control systems to produce behavioral norms (the way we do things around here). A client's corporate culture will define for account managers what they do, how they do it, why they do it, and, most importantly, their ultimate success. After all, it is client expectations which ultimately define client satisfaction.

The parallel issue is the role of personality in business. In any business personalities remain distinct even while they are adapting themselves to the demands of their

corporate culture. An account manager, always in contact with a person, can gain immeasurably from the ability to consciously apply the lessons from the growing literature on this subject.

The key is to introduce the students to the extensive bibliography while abstracting the most relevant concepts. Supplementary texts such as *Barbarians At The Gate* and *To The End Of Time* can provide a realistic context for this study.

2.2 What to Promise

Marketing efforts, including advertising, can only be evaluated in terms of the application of the total marketing system. Viewed outside of the total marketing effort, advertising can only be measured on an efficiency scale. This is a scale which most agencies would consider a disaster. At the same time, it is not useful to evaluate marketing effectiveness or anyone's performance apart from management's satisfaction with the results.

To address these two issues an account manager must work toward the inclusion of advertising in, and the

perception of advertising as, part of a total marketing program. Since management satisfaction is a result of corporate culture, the account manager must foster a marketing systems approach as part of the culture. This is often described as a marketing partnership. This issue applies, however, whether the agency involvement is limited to advertising, to the provision of boutique services, to a marketing consultant's role, or even if the agency is in fact the client's marketing department.

To reach the point where advertising is judged on an effectiveness scale and as part of the marketing system, something like the DAGMAR approach is essential. Russell Colley's classic text on "Defining Advertising Goals for Measured Advertising Results" initiated a long history in understanding the role and function of advertising. Account managers must not only be familiar with the lessons of this literature, but also be able to incorporate it as a regular part of their contact dialogue.

2.3 Strategy Selection

The myth of creative teams of copy writers and art directors bouncing off the walls in the middle of the night

until they suddenly produce the right strategy and advertising will probably never die. The fact is, however, that an agency creative department (like the media and research departments) is filled with highly skilled rhetoricians who are charged with bringing to life strategies and messages defined by others.

Strategy is the bridge between the client's marketing system and the various agency departments. The building of this bridge is an essential responsibility of account management not only because it is a critical key to client satisfaction, but also because it is a critical tool of internal management at the agency.

Account managers must become expert in translating marketing strategies into advertising objectives and strategies. The marketing strategy might be to increase consumer trial in order to achieve the marketing objective of accelerating growth. What an agency creative department must know is what ideas, facts or perceptions about the product or service must we put into whose minds in order to increase the probabilities that they will try the brand. In short, they need a bridge.

The building of this bridge requires that someone describe the brand's competitive area and source of sales, identify the prospect target group, define the message elements and promise to the consumer, and accumulate the arguments which can legally support this promise. These are account management responsibilities and they require exercise to become fluent at the tasks.

Beyond "training" future account managers, these efforts have two other important learning objectives. First, they provide intellectual discipline and experience in problem solving. Secondly, they introduce students to the core of economic and political rhetoric in society.

3. Account Coordination

Account coordination is much more specifically a study of how an advertising agency works. Its three major components, however, can be perceived as relevant to all service industries and activities. The three components are:

1 - Managing a process

2 - Direction for satisfaction or approvals

3 - Profit & Loss sensitivity or responsibility.

3.1 Process Management

The essence of these responsibilities is to plan, organize and control the preparation of advertisements (and other agency products) from job initiation, through production, to the release of the advertising materials to the media. The management responsibility is to insure an orderly and efficient process which will ensure the satisfaction of client requirements and meeting of media deadlines without sacrificing production quality or incurring unnecessary expense.

The account coordination function requires all of the education as an advertising generalist that the account manager can accumulate and absorb. It forms the foundation. Account coordination, however, requires a production management, quality control, and client satisfaction point of view not normally shared by specialists or taught through specialities.

Two key approaches are a tracking of the production process and a tracking of the approval process. Both begin with client and account management agreement on a strategy, message, targets and cost objectives. Account management

then communicates this information to creative and media and establishes due dates. It is the account manager who establishes production schedules and production orders, secures estimates and gains approval of the mechanicals. The account manager is on scene during commercial shoots and approves the results before they are shown to the client. Finally, it is account management's job to make sure that the copy or tape are delivered on time, with the right instructions, to the media outlets. It is a job full of details and is best introduced through the details.

The approval process is equally instructive. Various levels within the agency and, of course, the client must approve the copy and layout, the cost estimates, the finished copy and layout, the mechanical and proofs, and the final product. Each of these steps may involve the approval of two to as many as twenty people. This involves the management of satisfaction. The management of satisfaction requires a working knowledge of everyone's expectations. In turn, these expectations are built into the management of the production process as quality control.

The management of systems and satisfactions is a complicated process which gains immeasurably from

experience. The closest substitute in a brief course in account management is built on cases and role playing. Nancy Saltz provides some interesting cases in her text which would have to be restructured for role playing. Other roles might emerge from cases which focus on last minute changes in both copy and media dictated by a client and how the account manager would approach the media and creative professionals. Another might involve approaching the client with a final estimate which is more expensive than the client expected. Another might involve the potential disasters surrounding a commercial shoot.

3.2 Profit Management

It is useful to conclude this segment of the course with a discussion of the agency's profit and loss. The focus on client satisfaction and the client's business often overlooks that the agency is also a business which must make a profit on its accounts. Profit and loss is a continuing responsibility of account management.

Successful client management means successful account management. The best account managers are superlative business people. How they allocate the resources of their

agency to serve their clients will determine how profitable the agency is. Since the advertising agency business is actually a very small business -- based on commissions, mark-ups and fees -- apparently small decisions can have a significant impact on the bottom line.

It is important for an account manager to understand how the agency's gross revenue dollar is allocated for salaries, benefits, overhead and direct non-billable expenses. The account manager must know how to profit plan and how to take corrective action when needed.

An appropriate learning experience might be constructed out of a case in which the students are provided a brand and a budget and asked how they would staff the account and manage it profitably. When they put numbers on their answers, students often discover that they are overstaffed. They then discover that the key to working with a reduced staff is not to act until all the necessary information has been distilled into executional form and, then, to apply all of the skills of effective people management.

4. People Management

A typical session by a professional management trainer begins with some student activity which is expected to make the participants aware of their need for the skills about to be taught. The professional trainer generally has the advantage of instructing participants who have just come out of a line function and who will return to that line function after the session. They have practical experience and an urgency to succeed in their business environment.

College instructors face just the opposite set of circumstances with their students. Even those who have "jobs" are innocent of executive responsibilities and naive about management functions. No course can overcome these circumstances. It is ironic, nevertheless, how infrequently professional programs overlook the critical importance of people management skills to their students' future professional functions.

The primary goal has to be awareness since colleges are not in the training business. Typical skills and training topics which future account managers should be aware of include:

* Setting goals, objectives and deadlines.
* Motivating groups and individuals.
* Effective listening.
* Effective communications.
* Supervisory styles.
* Leadership vs supervision.
* Delegating.
* Developing a creative environment.
* Giving and receiving positive feedback.
* Time management.
* Effective meetings.
* Conflict resolution.

Most major agencies, as well as most major businesses, provide training sessions on these topics. The theoretical and how-to literature is extensive. The key to awareness among future account managers is to involve them as "trainers". If they learn nothing from sessions led by others, the assumption of the "training" responsibility for one of the topics should, at least, make them self-conscious managers of one key element.

5. Selling the Work

In the end, if account managers do not sell their agency's advertising and service products, they don't accomplish a thing. Advertising account managers must be effective advertising presenters and salespeople. The concluding units of an account management course, therefore, should be focused on selling the work.

The selling process is actually an excellent place to review the course to date. The first selling step is to understand the client to the point that the account manager can identify what work will constitute client satisfaction and what barriers to the understanding and acceptance of good work the client might embody. The recognition of the importance of this step at the "selling moment" reemphasizes the importance put on corporate culture and related issues at the beginning of the course.

The second step is internal preparation which emphasizes the importance of understanding and managing the process of producing good work. The "selling moment" highlights the importance of staying close to the work as it is being prepared. It enables the account manager to

anticipate and be prepared to explain issues and questions. It also involves the account manager to the point of identification. You have to believe in the product to be able to sell it effectively.

A useful exercise is to ask the students to select and compare two advertisements for different brands in a competitive category. This forces them to think like an account manager as work is being prepared. After all, they are the ultimate quality control officer. After this drill, the student should be asked to "sell" one of the ads to another student playing the client. This interchange is often very revealing.

This same process can be applied to media planning and research products. This might also be the appropriate time to introduce the importance of legal clearances and what basic legal issues the account manager must be aware of. Whatever the case, putting the future account manager in a selling situation at the "selling moment" is a successful way of summarizing all that has proceeded it in the course and motivating them to master the process and skills. It is important for them to conclude the course as good "presenters", but it is more important for them to be

prepared to be excellent account managers.

Conclusions

Account managers in advertising agencies are responsible for managing the client relationship, for managing the operation of accounts, for sharing responsibility for the agency's products and profits, and for selling the products. Driven by the belief that these experience-based skills are only learned in the doing, advertising curricula have emphasized the development of advertising generalists trained through skill specific courses. The key symptom may be the little notice introductory textbooks give to account management.

The purpose of this exploration has been to discover and suggest the outlines of a syllabus which will prepare a future account manager at least as well as courses in copy, layout and media planning prepare their future professionals. It has also been our purpose to insure that a course in account management is rooted in academic inquiry and fundamental college disciplines, and that it applies to an understanding of all service businesses. Hopefully, it will be helpful and that discussion will improve it. ###

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